

Visit the Gateway at <https://gateway.ifionline.org/login.aspx>

# Gateway User Guide

## Form 1 Budget Estimate

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## Accessing Form 1


First, navigate to the Unit Main Menu by selecting your unit and then clicking “View Forms, Enter and Edit Budgets.”

**Department of Local Government Finance Tasks**


 **Customize Funds, Departments, Debts, Rev. Codes**  
View and edit lists of funds, depts., debts by fund and rev. codes.











  **View Forms, Enter and Edit Budgets**  
View, edit and submit Forms to DLGF.

 **County Council Review Worksheet**  
View and edit the County Council Review Worksheet for the selected unit.

 **Submit Proof of Publication and Signed Form 4**  
View, upload and submit budget-related documents to DLGF.

From the Budget Form Menu, select “Form 1: Budget Estimate” and notice the menu expand beneath Form 1. Then click on the link on the left side of the Form 1 box that says “Click to edit form.”



<b>Current Year Financial Worksheet: Additional Calculations for Form 4B</b>	
<b>Debt Worksheet</b>	
<b>Form 1: Budget Estimate</b>	
<div> <a href="#">Click to edit form</a></div> <div> Not 'Ready to Submit'.</div>	
<b>Form 2: Estimate of Miscellaneous Revenues</b>	
<b>Form 3: Notice to Taxpayers</b>	
<b>Form 4: Ordinance for Appropriations and Tax Rates</b>	
<b>Form 4A: Budget Report</b>	
<b>Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate</b>	

Form 1 navigates through a drop down menu that allows users to select a fund and department. Please note that school units will use the Department field in place of their Program Accounts. As you see below, the form currently displays No Department. This is the default for users that are not departmentalized or that have not yet created and linked a department to the selected fund.

**BUDGET ESTIMATE FOR**

**Select Fund:**  
 0101 - GENERAL  

**Select Department:**  
 0000 NO DEPARTMENT 




If you have previously completed a Budget in Gateway you should notice the funds, departments and line items with data entered carry over from the previous year. Line items in the Capital Outlays and Debt Service tabs are the exception and have not rolled over.

**Select Fund:**  
 0101 - GENERAL 

**Select Department:**  
 0000 NO DEPARTMENT 

Copy All Published Amounts for Fund 

Select Category Tab

		Personal Services	Supplies	Services And Charges	Capital Outlays	Debt Service
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount
✗	Salaries and Wages		Board Members	\$		\$
✗	Salaries and Wages		Police Chief	\$		\$
✗	Salaries and Wages		Clerk/Treasurer	\$		\$
+ ADD	Salaries And Wages 			\$		\$
TOTALS BY CATEGORY				Total: \$ 0		Total: \$ 0
TOTALS BY DEPT BY FUND				Total: \$ 0		Total: \$ 0
TOTALS BY FUND				Total: \$ 0		Total: \$ 0
TOTALS BY UNIT				Total: \$ 0		Total: \$ 0
						

## Ensuring Proper Number of Forms is Available

The availability of Form 1's are based upon the unit customization of fund and department combinations. To ensure that the proper number and type of forms are available, please be sure that you have added all necessary funds and departments and have them linked appropriately to each other. For additional assistance, please see the Adding, Deleting, and Connecting Funds and Departments user guide.

## Entering Data on the Form 1

For each line item, Form 1 collects five pieces of information:

- (1) Sub-Category
- (2) Line Item Code
- (3) Description
- (4) Published Amount
- (5) Adopted Amount.

Personal Services	Supplies	Services And Charges	Capital Outlays	Township Assistance	Debt Service
Sub-Category      Line Item Code      Description      Published Amount      Adopted Amount					
<div><div>+ ADD</div><div>Salaries And Wages</div><div></div><div></div><div>\$</div><div></div><div>\$</div><div></div></div>					

The **Sub-Category** field simply breaks down the selected category to additional sub-categories. You will also note another category in the event your line item does not clearly fall into a specific sub-category.

The **Line Item Code** field collects your local code. This may be the State Board of Accounts codes for expenses or your own local tracking codes. Some units do not use Line Item Codes. Entry of a code in this field is optional. The field is included to assist you in tracking your expenses back to your local record-keeping.

The **Description** field should be filled out. This field is mandatory, but is a local description and does not need to tie back to any prescribed code lists.

For each line item, Form 1 collects two values: the published amount and the adopted amount. The **Published Amount** is the amount that is proposed at the beginning of the budget process and published in the newspaper. The **Adopted Amount** is the amount that is approved by the fiscal body and adopted by ordinance or resolution.

## New Expenditure Code List



This year the Department has incorporated the State Board of Accounts' expenditure code list. Initially, the most noticeable change is the additional blue category tab. All funds will have a new Debt Service tab appear, while the 0840 - Township Assistance fund also has a new Township Assistance tab. Additionally, a few of the sub category items on the dropdown menu have changed to accommodate the new expenditure code list. A link to the new expenditure code list can be found at:

<http://www.in.gov/sboa/files/2012DisbursementCodes.xlsx>

## Adding a New Line Item

To add a new line item, first select the appropriate category from the blue tabs at the top of the form. You will then select the appropriate sub-category from the drop down menu, add a line item code if you would like, and then add a description of the expense. You may also enter the amounts at the same time. Now that the data is entered, you can save it by selecting the "+ADD" button on the left hand side.

	Personal Services	Supplies	Services And Charges	Capital Outlays	Debt Service
Sub-Category			Communication And Transportation		
Line Item Code			0101-002		
Description			Travel		
Published Amount			\$ 500		
Adopted Amount					

+ADD

## Editing Line Items

In most cases, the Form 1 contains some pre-existing line items that have rolled over from the previous year. There may come a time where you may need to edit a line item's line item code or description. To edit a line item, click in the field that you wish to edit, make your changes, and then click the "Save" button on the bottom right-hand side of the page.

Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount
X	Salaries and Wages	0101-100	Salary of Trustee	\$	\$
X	Salaries and Wages	0101-110	Salary of Clerical Help	\$	\$
X	Salaries and Wages	0101-125	Pay of Township Board	\$	\$
+ADD	Salaries And Wages			\$	\$
TOTALS BY CATEGORY				Total: \$ 0	Total: \$ 0
TOTALS BY DEPT BY FUND				Total: \$ 0	Total: \$ 0
TOTALS BY FUND				Total: \$ 0	Total: \$ 0
TOTALS BY UNIT				Total: \$ 0	Total: \$ 0

SAVE

## Entering Data on an Existing Line Item

To enter amounts on an existing line item simply select the field, type in the amount and click “Save”.

Personal Services						Supplies	Services And Charges	Capital Outlays	Debt Service
Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount				
	Office Supplies	0101-210	Office Paper	\$ 300	\$				
	Office Supplies			\$	\$				
TOTALS BY CATEGORY				Total: \$ 0	Total: \$ 0				
TOTALS BY DEPT BY FUND				Total: \$ 0	Total: \$ 0				
TOTALS BY FUND				Total: \$ 0	Total: \$ 0				
TOTALS BY UNIT				Total: \$ 0	Total: \$ 0				
SAVE									

## Deleting a Line Item

If you would like to delete an existing line item select the red “X” on the far left of the page. This will delete a single line item. If an error is made on the sub-category field you will want to delete the line item and enter it below, making sure to select the “+ADD” button once finished adding a new line item.

Personal Services						Supplies	Services And Charges	Capital Outlays	Debt Service
Delete	Sub-Category	Line Item Code	Description	Published Amount	Adopted Amount				
	Office Supplies	0101-210	Office Paper	\$ 300					

## Copying Published Amounts to Adopted

If your budget is adopted without any changes you may easily copy your published amount column to the adopted amount for the selected fund, just by clicking the “Copy all Published Amounts for Fund” button. You may then want to select the next fund and copy those amounts as well.

Select Fund:  
0101 - GENERAL

Select Department:  
0000 NO DEPARTMENT

Select Category Tab

Personal Services	Supplies	Services And Charges	Capital Outlays	Debt Service
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Copy All Published Amounts for Fund

If you wish to be more selective about what amounts are copied, you may click on the blue “COPY” arrow between the published and adopted column. This will only copy the amounts in the current category of the selected fund and department.

<div> <div>Personal Services</div> <div>Supplies</div> <div>Services And Charges</div> <div>Capital Outlays</div> <div>Debt Service</div> </div>						
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount
✗	Employee Benefits		Tax Preparation	\$ 600		\$
✗	Salaries and Wages		Pay of Township Boar	\$ 2,000		\$
✗	Employee Benefits		Social Security-Civil T	\$ 500	<b>COPY</b> →	\$
✗	Salaries and Wages		Salary of Clerical Help	\$ 1,400		\$
✗	Salaries and Wages		Salary of Trustee	\$ 8,000		\$

You will want to navigate to each combination of categories, funds and departments to complete the adopted amounts for all of your line items.

If your adopted amounts have changed from your published amounts, simply type in the adopted amounts and click “Save” at the bottom of the form.

<div> <div>Personal Services</div> <div>Supplies</div> <div>Services And Charges</div> <div>Capital Outlays</div> <div>Debt Service</div> </div>						
Delete	Sub-Category	Line Item Code	Description	Published Amount		Adopted Amount
✗	Office Supplies	0101-210	Office Paper	\$ 300	<b>COPY</b> →	\$ 100
<b>+ ADD</b>	Office Supplies			\$		\$
<b>TOTALS BY CATEGORY</b>				Total: \$ 300		Total: \$ 100
<b>TOTALS BY DEPT BY FUND</b>				Total: \$ 29,300		Total: \$ 100
<b>TOTALS BY FUND</b>				Total: \$ 29,300		Total: \$ 100
<b>TOTALS BY UNIT</b>				Total: \$ 98,801		Total: \$ 0
Form values saved at 04:35 PM and 39 seconds.						




## Signing the Form Electronically

At the bottom of Form 1, there is a box for you to place an electronic signature on the form. Only the user with submission rights will see the signature box.


**Form Signature**

NAME

TITLE

SIGNATURE/PIN  
 

DATE

 **SIGN AND DATE FORM**

I hereby acknowledge that the submission of this document through the Gateway password and PIN system constitutes an "electronic signature" as defined in IC 5-24-2-2. This submission is intended to, and hereby does, constitute authentication and approval of the submitted document as required by the Indiana Code. I understand that this electronic signature takes the place of my handwritten signature and accomplishes the same purposes as would my handwritten signature in the same circumstance. I further acknowledge that this electronic signature has the same force and effect as my handwritten signature and can and will be used for all lawful purposes. I affirm that I have the real and apparent authority to electronically sign and submit this document on behalf of the unit.

The signature box will be invisible to users with edit or read-only rights.

To sign the form, first type your name and title into the signature box. After that, you will need to enter a four-digit PIN code. This PIN code has been sent to the person with submission rights via email. You may contact the DLGF at [gateway@dlgf.in.gov](mailto:gateway@dlgf.in.gov) or at (317) 232-3777 in the event that you have lost or not received a PIN code. Once you select "Sign and Date Form," today's date will automatically populate the date field.

**Form Signature**

NAME

TITLE

SIGNATURE/PIN  
 

DATE

**Form signature values saved at 02:54 PM and 58 seconds.**

 **SIGN AND DATE FORM** 



Once you see the red text stating "Form Signature Values Saved," you have successfully signed Form 1.

## Marking the Form “Ready to Submit”

At the bottom of Form 1 and all other forms you will notice the Ready to Submit status boxes. Before you complete the form you will notice a grey box that is titled Not Ready to Submit.


The budget forms have a feature built in called validation. This does not allow the form to be marked as Ready to Submit, or be submitted until the required fields are completed. Validation will help prevent some commonly found errors in previous years. Under a closer look, you will notice that the box states,

*“You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been **signed** with a valid four-digit PIN.”*

 **Not Ready To Submit** 


You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.

Once information has been entered in the published and adopted columns, and you have signed the form with your PIN, the yellow “Ready to Submit” option will appear. This gives users the ability to mark the form as ready to submit by clicking on the check box. You will not want to check this box until all the line items, published, and adopted amounts are entered.

☐ **Ready to Submit** 






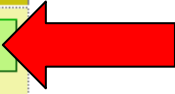
This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

Once this box is checked, the section will turn green and the form will now be marked as “Ready to Submit.” Form 1 will still be editable until it is submitted.

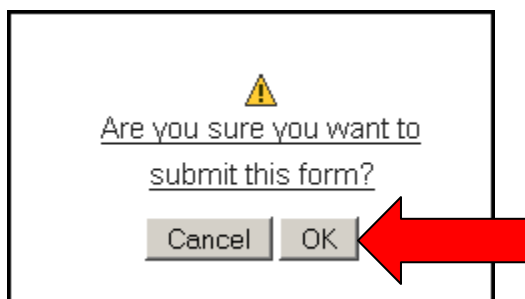
☒ **Ready to Submit** 

This Form will still be editable after checking this box. The 'Ready to Submit' option allows a form to be set visibly complete throughout the application and to be officially submitted to DLGF from the Budget Form Menu. Only Submitting the form to DLGF from the Budget Form Menu will turn off the editing function of the form.

Note that after Form 1 has been marked as “Ready to Submit,” Form 1 under the Budget Form Menu now shows a green submit option for officials with submission rights.

<b>Current Year Financial Worksheet: Additional Calculations for Form 4B</b> 	
<b>Debt Worksheet</b> 	
<b>Form 1: Budget Estimate</b> 	
 <a href="#">Click to edit form</a>	 <a href="#">Click to submit completed form to DLGF</a> 

If you have completed your Form 1 and will not need to make any changes, you may click on the green “Click to submit completed form to DLGF” button. You will notice a pop-up box asking you if you are sure you want to submit this form. If you are ready to submit, simply press “OK.”



As you will note below, Form 1 on the Budget Form Menu will now appear green and you will now only have the option to view the form.

<b>Current Year Financial Worksheet: Additional Calculations for Form 4B</b>	⚠
<b>Debt Worksheet</b>	⚠
<b>Form 1: Budget Estimate</b>	✓
<input type="button" value="Click to view form"/> <input checked="" type="checkbox"/> This form has been submitted.	


You may no longer edit a form once it is submitted. If you have submitted a form by mistake, please contact the DLGF at [gateway@dlgf.in.gov](mailto:gateway@dlgf.in.gov) or at (317) 232-3777.


## Viewing and Printing the Form

At any point, Form 1 can be printed directly from Gateway. Click the button at the top-left corner of the form that reads, “Click Here for Print/Viewing Options.” From here, you will have the option to print the currently selected funds or all funds. Please select one.

[Select Unit](#) > [Unit Main Menu](#) > [Budget Form Menu](#) > **Form 1**

Selected Year: 2013 | Selected Unit: Adams County - 0001 Blue Creek Township, Adams Co.






- Print/View Form 1 for **Selected Fund** in All Formats
- Print/View Form 1 for **All Funds for Selected Unit** in All Formats

BUDGET ESTIMATE FOR

Select Fund:

0101 - GENERAL

Once you see the page appear in a new window click on the icon that resembles a save icon in the middle at the top of the page to view the export options.

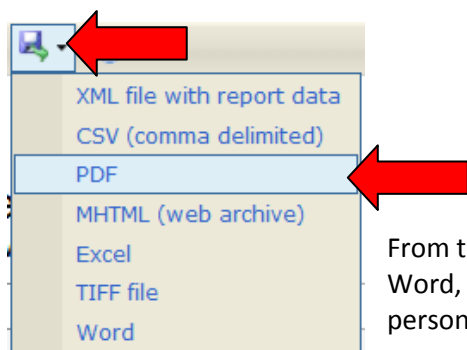


Prescribed by the Department of Local Government  
Finance Approved by the State Board of Accounts

### Budget Form 1 - Budget Estimate

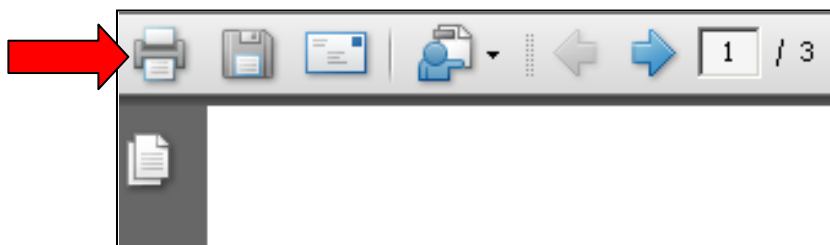
Year: 2013 County: Adams Unit: Blue Creek Township

Fund	Department	Category	Sub-Category	Line Item Code	Line Item	Publisl
0061 - RAINY DAY	NO DEPARTMENT	SERVICES AND CHARGES	Other Services and Charges		transfer of funds	
0061 - RAINY DAY Total						
0101 - GENERAL	NO DEPARTMENT	PERSONAL SERVICES	Salaries and Wages		Salary of Trustee	



From the list of export options, you may export your Form 1 into a PDF, Word, Excel, or many other different file types. This allows you to personalize how you wish to have your data displayed.

If you wish to quickly and easily print off the form, you may want to click on “PDF” and then click the printer icon.



Congratulations! You have successfully submitted your Form 1. Please see our other user guides for assistance with other forms.